

Authorisation to transfer from another provider

You can use this form to transfer an existing ISA into your Octopus AIM Inheritance Tax ISA. If you are transferring more than one ISA, please complete a new authorisation form for each ISA you are transferring. **This form must be used in conjunction with either the full Octopus AIM Inheritance Tax ISA application form or top-up form, depending on whether you are opening a new portfolio or adding to your existing investment. Please complete all fields.** Go to octopusinvestments.com/investor/document-library to find copies of these forms.

Section 1 – About the investor

Title (Mr/Mrs/Miss/Ms/Other)

First name(s)

Last name

Date of birth DD MM YYYY

Postcode

National Insurance number

Section 2 – Authorisation to transfer from another provider

I have a (tick one box only) Stocks and shares ISA, **OR** Cash ISA

Please transfer my ISA

In full, **OR** In part - please complete the below section, and check with your existing ISA Manager that they can accommodate a partial transfer.

ISA INVESTMENTS TO BE TRANSFERRED IN PART

Please transfer % of my total ISA holding, **OR** please transfer specific tax years as detailed below (e.g. 2016/17).

1. / 2. / 3. /

4. / Estimated value of transfer £

Section 3 – Details of current ISA Manager

Company name

Account number of the ISA to be transferred

Sort code (If your ISA is held by a bank)

Telephone number

Address

Country

Postcode

Section 4 – Transfer instruction

I hereby instruct my current ISA Manager to transfer the ISA referred to in this form, to Octopus Investments Limited (my new Manager) by liquidating the assets and forwarding the proceeds to Octopus Investments Limited. I authorise my existing ISA Manager to provide Octopus Investments Limited with any information, written or non-written, concerning the ISA and to accept any instructions from them.

Applicant signature

Date signed DD MM YYYY